



# **2005 Marketing Update**

## **- Japan -**

# Tough Competition



## 2004 Communication Concept

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6 islands, 6 surprises.

# HAWAII

# 2004 Recovery

1. For the first time since 1997, Japanese arrivals to Hawaii increased.
2. Three additional flights were launched by United Airlines, Northwest Airlines and Continental Airlines.

	<u>Visitors</u>	<u>Air Seats</u>	<u>Visitors/Air Seats</u>	
1997	2,222,650	2,986,762	74.4%	Peak Year for Hawaii
1998	2,004,354	2,691,481	74.5%	
1999	1,825,586	2,456,836	74.3%	
2000	1,817,644	2,437,584	74.6%	Peak Year for Overseas Traveler
2001	1,507,980	2,160,581	70.7%	9.11
2002	1,484,770	1,961,733	75.6%	SARS, War in Iraq
2003	1,328,820	1,785,277	74.2%	
2004	1,477,629	1,792,377	82.6%	
2005		1,870,000		

\*Regular flight seats only

# 2004 Marketing Results Substantiation

The images of Hawaii HTJ has been communicating are being solidly established.

## Impressions of Hawaii

"Has many places to visit"	47.5% → 66.0%
"Has good food"	18.1% → 37.2%
"Has history"	16.2% → 33.7%
"Has beautiful nature"	24.2% → 37.8%
"Energetic"	49.5% → 68.8%
"Something to aspire to"	32.9% → 42.5%
"Sophisticated"	27.8% → 34.3%
"Has traditions"	13.7% → 29.0%

Source: Dentsu survey, June 2004



# **2005 Marketing Strategy**

# 2005 Challenges

1. **The number of travelers to Hawaii is growing but approaching a saturation point with limited air seats and hotel inventory.**
  - It is necessary to improve the quality of tourists, in terms of length of stay and spending.
  
2. **Compared with other resort destinations, Hawaii is still weak in the images of “being unique,” “has tradition” and “mysterious.”**
  - It is necessary to enhance these images for Hawaii by communicating its unique culture and history.  
We need to provide new purposes for visiting Hawaii, such as education, sports, spa and anniversaries.

## 2005 Communication Concept

# Discover Aloha

In 2005, we will communicate Hawaii's unique culture, tradition and history to convey in depth the charm and aloha spirit of Hawaii.



# Communication Motifs

- The Word “Aloha”
- Aloha Shirt
- Lei/Lei Day
- The 120th Anniversary of Official Japanese Immigration, “Kanyaku Imin”
- The Aloha Spirit
- Aloha Friday
- Hokule’a

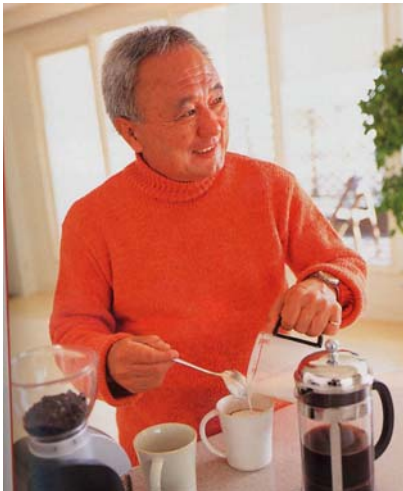
- A** Akahai: Compassion. Respecting others
- L** Lokahi: Cooperation. Helping others out
- O** Olu’olu: Joy. Tender feelings toward others
- H** Ha’aha’a: Humbleness. Being humble with regard to others
- A** Ahonui: Patience. Accepting others



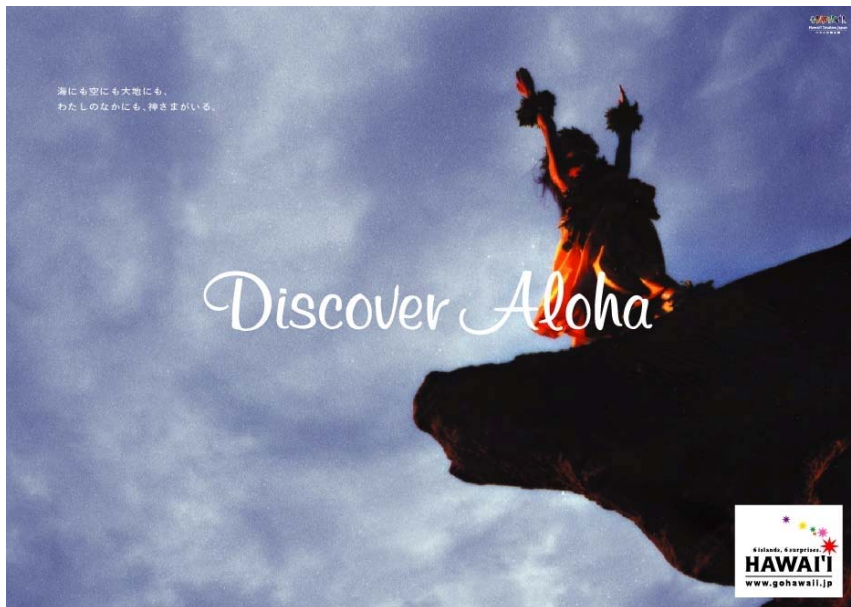
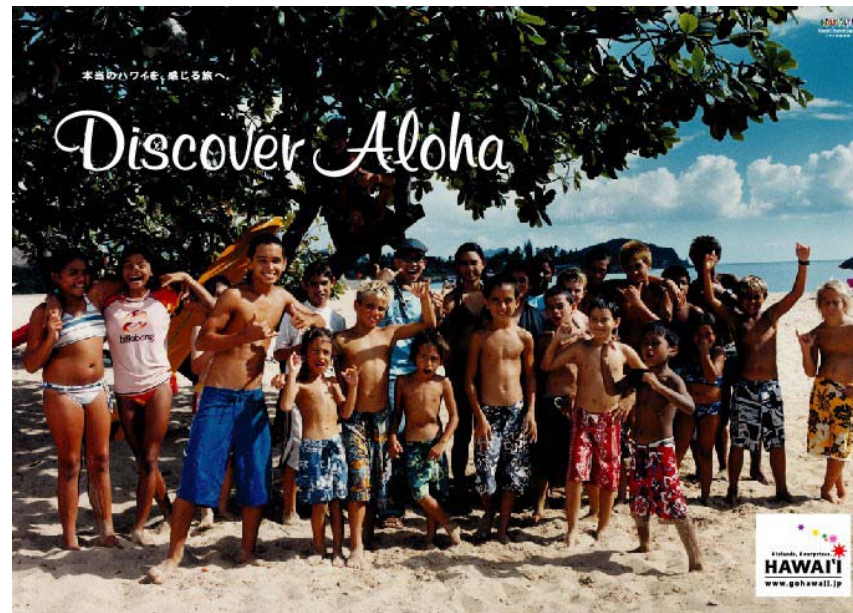
# Communication Targets

All audience groups, with special focus on strategic markets:

- Active Seniors
- Families
- Weddings/Honeymooners
- Single Females



# Communication Themes





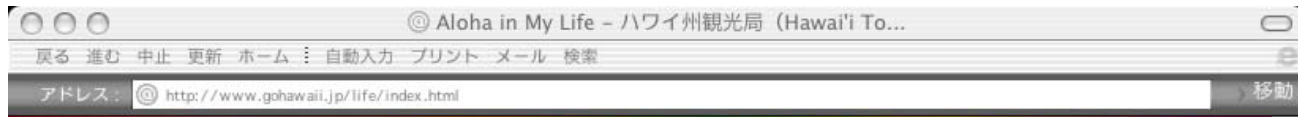
# Website

- Important Considerations for the site renewal:
  - Further improve the quality of contents based on the “Discover Aloha” concept.
  - Enhance:
    - 1) Entertainment quality
    - 2) Interactivity
    - 3) Support for travel trade
- Major New Contents
  - “Hawaiian Workshop”
  - “Aloha People”
  - “Aloha Theater”
  - Downloadable maps

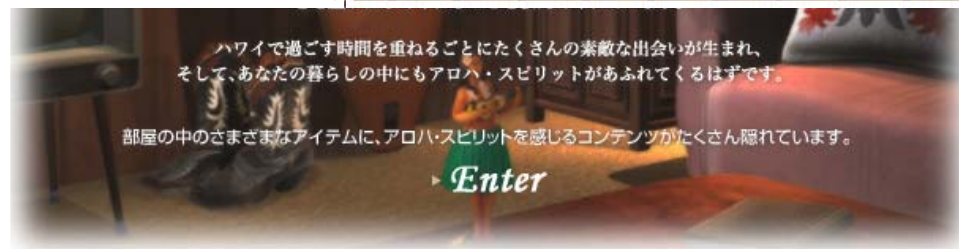
[www.gohawaii.jp](http://www.gohawaii.jp)



# Website



- ★ ハワイ州観光局の活動
  - ▶ イベント in Japan
  - ▶ アド・ギャラリー
  - ▶ メディア&タイアップ情報
- ★ ハワイホットニュース
- ★ ハワイ・イベント・カレンダー
- ★ メールマガジン・バックナンバー
- All About Hawai'i
- ★ Hawai'i AtoZ
- ★ Business in Hawai'i
- ★ ハワイ旅のQ&A
- .....
- ★ マップ・ダウンロード
- ★ ハワイ関連リンク



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# Collateral Materials

## ➤ “Discover Aloha” Island Maps



## ➤ “Discover Aloha” Brochure





# “Deep in Aloha” Special TV Program



- Broadcast Time: 10:54 p.m. – 10:59 p.m.  
Every Thurs., Jan. – Mar. '05, 13 weeks
- TV Station: TV Tokyo (Approx. 5% viewership, 17-mil. household)

This program delves into the profound attractions of Hawaii through the people who make the traditions and cultures of Hawaii part of their lives, and who embody the Spirit of Aloha.

#1 Ms. Marylouise Kekuewa	Feather Lei
#2 Mr. Derek Ahsing	Lomilomi Massage
#3 Ms. Margaret Keahi Leali	Coconut Postcard
#4 Mr. Didi Offermann	Art Show
#5 Mr. Alan Akaka	Steel Guitar
Mr. Nainoa Thompson	Hokulea
	Hawaii Arts Season

# Promotional Events

- Under “Discover Aloha” concept, develop events with focus on the culture and aloha spirit of Hawaii.
  - Provide the audience with authentic experiences of Hawaii.
  - Capitalize on the unique traditions of Hawaii, such as “Lei Day,” “Aloha Friday,” etc.
  - Aim for integrated communication with mass media, Web, and PR activities.
- 1. Golden Week Promotions: Tokyo/Hiroshima/Sapporo
- 2. July 14-17: Tour Expo Osaka
- 3. Summer Promotions: Tokyo/Yokohama/Osaka/Kobe
- 4. Sept. 22-24: JATA World Travel Fair

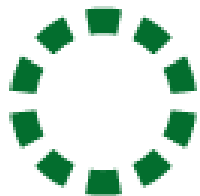


# Discover Aloha

— Hawaii Festival —

## Aichi Expo

- May 2 & 3: Expo Plaza
- June 4: Expo Dome
- July 31 & August 1: Expo Plaza



**EXPO**  
2005 AICHI  
JAPAN





# Travel Trade Programs

- Collaboration with other Hawaii promotion groups:
  - HPCE (Hawaii Promotion Committee East)
  - OHPC (Osaka Hawaii Promotion Committee)
  - JHEC (Japan Hawaii Economic Council)



# Travel Trade Programs

## ➤ Seminar & Workshop

e.g. “Discover Aloha 2005 Hawaii Seminar & Workshop”

- Tokyo Jan. 24 240 guests
- Osaka Jan. 26 140 guests
- Nagoya Jan. 28 95 guests

## ➤ Travel trade media collaboration

- Travel Journal
- Travel Vision
- Wing Travel



# Travel Trade Programs

## ➤ Travel Trade and Media FAM Tours

- |               |   |
|---------------|---|
| 1) Jan. 24-28 | Media FAM with Continental Airlines (Oahu)  |
| 2) Feb. 3-7   | Media FAM with Japan Airlines (Oahu)<br><i>*Provided hula and Hawaiian music only</i> |
| 3) Apr. 6-10  | Travel Trade FAM with Northwest Airlines (Maui/Oahu)                                  |
| 4) Mid. Apr.  | Media FAM with Japan Airlines (Big Island/Oahu)                                       |
| 5) May/June   | Travel Trade FAM with China Airlines (Big Island/Oahu)                                |
| 6) October    | Travel Trade FAM (Kauai/Oahu)   |
| 7) October    | Media FAM (Lanai or Molokai/Oahu)   |

# Travel Trade Programs

- Monthly e-mail newsletters
- “Hot News”: Web information listing of new and news worthy information
- Media tie-up opportunities
- Photo Library
- JATA World Travel Fair: Sept. 22-24, 2005 Big Sight, Tokyo



